Good Food Media Network

COVID-19 Industry Impact Report

Consulting Report by:

Business Research Division
Leeds School of Business
University of Colorado Boulder

May 2021

Leeds School of Business
UNIVERSITY OF COLORADO **BOULDER**

Page intentionally left blank.

TABLE OF CONTENTS

EXECUTIVE SUMMARY

In 2021, a total of 124 restaurant brands from around the United States participated in the fifth annual survey of Good Food 100 RestaurantsTM. A program of the Good Food Media Network, Inc. (GFMN), a 501(c)(3) nonprofit, the Good Food 100 provided a framework for collecting information about restaurant operations and food purchases. The Business Research Division at the Leeds School of Business tabulated, analyzed, and reported the findings.

The 124 participating restaurant brands in the Good Food 100 represented 196 individual restaurant locations across 33 states. Nearly half (46.8%) of the participating restaurant brands reported having a female CEO or owner, while over one-fourth (25.9%) reported having a female Executive Chef or Culinary Director. A plurality of the respondents are fine dining restaurants, but many other categories, such as casual diners, caterers, bars, and even food trucks, are represented as well.

The COVID-19 pandemic impacted the participating restaurants in many ways. Most of the restaurants were still open for businesses at the time of the survey, with only 10 out of the 108 reporting restaurant brands reporting they have closed temporarily or permanently. Restaurants adapted to the pandemic environment by shifting to take-out and offering at-home meal kits and chef-prepared foods. Despite ongoing adaptations, the pandemic caused revenues to decline precipitously, with average revenue per individual restaurant declining 50.4% in 2020 year-over-year to $735,852, and average food purchases per brand falling in-kind. Bars were the hardest hit among restaurant types and restaurants in the Great Lakes region observed the steepest drop in revenue per restaurant. To assist with operations, the majority (91.1%) of responding restaurant brands received financial aid/relief from Federal, State, and City/Community sources.

While 2020 was a dismal year for the responding restaurants, most are expecting a much better second half of 2021. Almost 90% of restaurant brands expect an increase in revenues, 97% expect to hire employees, and 78% expect to increase good food purchases. Some restaurants appear to still expect headwinds, however, with 22% of respondents expecting it to be either somewhat or highly likely that they have to close one or more locations in the second half of 2021.

Participating restaurant brands reported spending $26.7 million on food in 2020. Total food purchases had a $75.6 million economic impact on the nation, including the direct, indirect, and induced impact of the purchases. This excludes the impact of overall business operations, ranging from the purchase of alcohol to labor and rent.

PURPOSE OF THE STUDY

The Business Research Division (BRD) of the Leeds School of Business at the University of Colorado Boulder was contracted by GFMN to study the impact of sustainable supply chains on the economy. According to GFMN, the Good Food 100 Restaurants is “an annual list of U.S. restaurants designed to educate eaters and celebrate restaurants—fast casual to fine dining to food service—for being transparent with their purchasing practices, and supporting farmers, ranchers, and fisherman.” Survey results provided both qualitative and quantitative operating information that allowed for an economic contribution analysis, as well as for a rating of restaurants by their sustainable sourcing practices. (See Appendix 1 for the complete list of participating restaurants.) The purpose of the study was to educate consumers about the people and businesses that are impacting the economy through sustainable sourcing of goods, and the challenges brought forth by the COVID-19 pandemic.

There are many economic benefits of sustainable supply chains. For example, localizing food purchases decreases “leakage” (purchases from outside the local region), which increases the total local economic impact (i.e., a vertically integrated industry). Other economic impacts (positive or negative) result from changes in food prices, other components of the supply chain (e.g., transportation and warehousing), and substitutes. The 2021 study examines food purchases by restaurants and challenges faced by these restaurants in 2020 and 2021.

METHODOLOGY

This study was conducted in cooperation with GFMN and the 124 participating restaurant brands. This study updates the inaugural GFMN study completed in 2017 and subsequent 2018, 2019, and 2020 studies. The research team collected data from restaurants about total food purchases by restaurant type and food segment. According to GFMN, good food is good for every link in the food chain: the environment, plants and animals, farmers, ranchers and fishermen, restaurants, and eaters.

Restaurants types identified in the study included:

- Bakery
- Bar
- Casual Dining (e.g., paper napkins, limited wine selection, etc.
- Catering/Off-Premise Events
- Coffee Shop/Café
- Fast Casual
- Fine Dining (e.g., cloth napkins, limited wine selection, etc.)

- Food Market/Specialty Shop
- Food Service (e.g., school, college/university, hospital, etc.)
- Food Truck
- Juice Shop
- Quick Service
- Ultra Fine Dining. (e.g., Tasting Menu, World's 50 Best, Michelin 3-Star, etc.)

Data were also gathered by geography:

- State
- Region (based on groupings from the Bureau of Economic Analysis)
    - Far West Region (Alaska, California, Hawaii, Nevada, Oregon, Washington)
    - Great Lakes Region (Illinois, Indiana, Michigan, Ohio, Wisconsin)
    - Mideast Region (Delaware, District of Columbia, New Jersey, New York, Maryland, Pennsylvania)
    - New England Region (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont)
    - Plains Region (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota)
    - Rocky Mountain Region (Colorado, Idaho, Montana, Utah, Wyoming)
    - Southeast Region (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia)
    - Southwest Region (Arizona, New Mexico, Oklahoma, Texas)

The BRD and GFMN research team updated the 2021 survey with input from GFMN partners and participating restaurants. Qualitative questions were asked in order to obtain information about restaurant demographics, growth, and challenges facing the industry. New to the survey this year were many questions related to the COVID-19 pandemic and how the restaurants have been impacted. The survey was hosted on the www.GoodFood100Restaurants.org website. GFMN distributed the survey and collected the data. A link was promoted nationally by GFMN (via email, Twitter, Instagram, and Facebook). The survey results allowed for the quantification of the total national economic contribution and national economic contribution by restaurant type.

Data were collected by food segment and were entered into the 546-sector IMPLAN input-output model with 2019 data, which quantified the economic contribution regionally and nationally.

This study only examined food purchases and did not examine other restaurant operations (e.g., rents, management, servers, etc.). It provides an economic contribution analysis, and not an analysis of net economic impacts. Additionally, there may be economic benefits associated with sustainability (e.g., recycling, composting, reduced energy use, employee retention, etc.), but these factors were outside the scope of study.

Overview of Economic Contribution Analysis

Economic benefits refer to dollars generated and distributed throughout the economy due to the existence of an establishment. This study estimates the economic contribution using the IMPLAN input-output model. Results are disseminated in terms of direct, indirect, and induced impacts on employment, labor income, value added, and output.

Economic benefits refer to dollars generated and distributed throughout the economy. The sources of impacts that sum to economic benefits cover construction and operating expenditures, including the off-site spending by employees and the spending on goods and services within the supply chain.

The multiplier effect of spending within the supply chain, or the indirect impact, estimates the indirect employment and earnings generated in the study area due to the interindustry relationships between the facility and other industries. As an example, consider a restaurant operating in Denver, Colorado. The restaurant employs servers, cooks, managers, and support staff for its direct restaurant operations—the direct impact. In addition, the company spends on goods and services to support its restaurant operations, leading to auxiliary jobs in the community in transportation, accounting, utilities, retail goods, and so on—the indirect impact. Furthermore, employees spend earnings on goods and services in the community, leading to jobs in retail, accounting, entertainment, and so on—the induced impact.

Conceptually, the multiplier effect quantifies the economic ripple effect of economic activity. This ripple effect can be positive or negative depending on whether a company or industry is expanding or contracting. Multipliers are static and do not account for disruptive shifts in infrastructure without specifically addressing infrastructure changes.

DEFINITIONS

Direct Impact: Initial economic activity (e.g., sales, expenditures, employment, production, etc.) by a company or industry.

Employment: Full-time and part-time workers.

Gross Domestic Product (GDP): A measure of economic activity, GDP is the total value added by resident producers of final goods and services.

Gross Output (Output): The total value of production is gross output. Unlike GDP, gross output includes intermediate goods and services.

Indirect Impact: The upstream (backward) economic activity impacted by purchases along a company or industry supply chain.

Induced Impact: Economic activity derived from workers spending their earnings on goods and services in the economy.

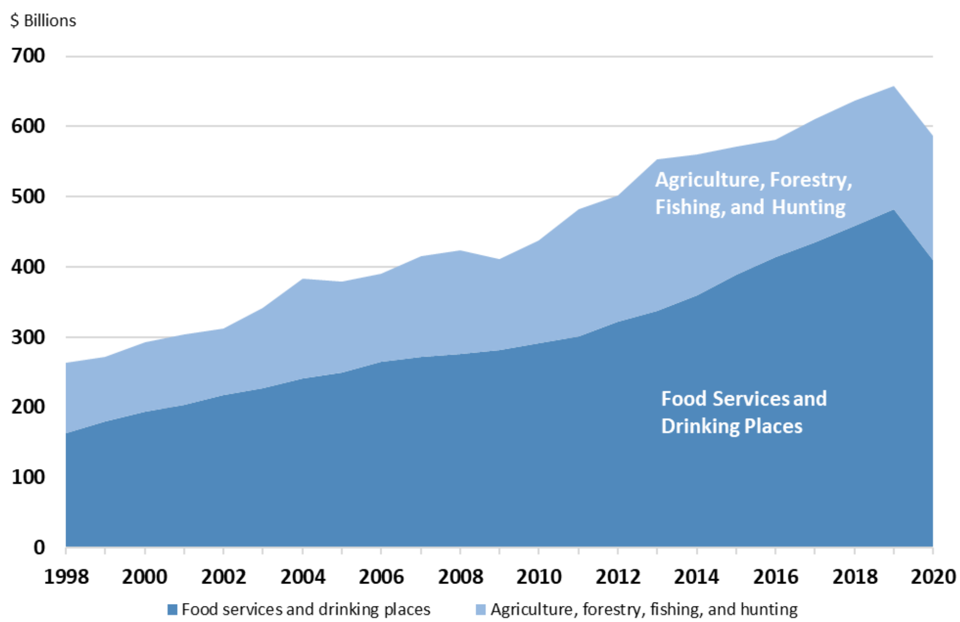
Labor Income: Total compensation of employees (wages and benefits) and sole proprietors (profits).

Value Added: The contribution of an industry or region to total GDP, value added equals gross output, net of intermediate input costs.

FOOD INDUSTRY ECONOMIC OVERVIEW

The food services and drinking places sector contributed 2%, or $410.1 billion to U.S. GDP in 2020, falling 14.8% year-over-year due to the pandemic-induced recession that shut down many restaurants across the nation (Figure 1). The sector has observed a 10-year compound annual growth rate (CAGR) of 3.5%. This sector includes full-service restaurants, limited service eating places, special food services, and drinking places (alcoholic beverages. One primary input to restaurants is food. Included in the agriculture, forestry, fishing, and hunting sector, the value of agriculture is volatile due to price changes. In 2020, nominal value added from this industry totaled $175.8 billion, a 0.2% increase from 2019.

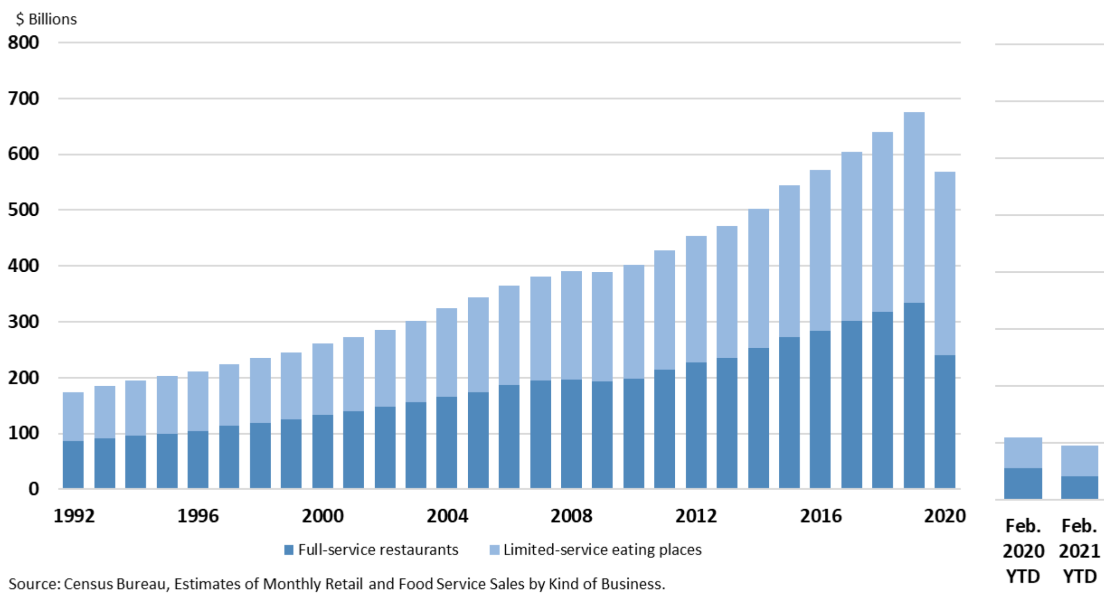
FIGURE 1: U.S. VALUE ADDED, FOOD SERVICES AND AGRICULTURE, 1998–2020



Source: Bureau of Economic Analysis, Value Added by Industry.

In terms of retail sales, full-service restaurants and limited-service restaurants recorded sales of $568.96 billion in 2020, a decline of 15.8% year-over-year due to the COVID-19 pandemic, marking the first drop since 2009 (Figure 2). Year-to-date through February 2021, sales are still down 12.6% over the same two-month period in 2020. The drop can be largely attributed to a steep 28% decline in full-service restaurant sales in 2020, as stay-at-home order were imposed across the U.S. and indoor dining was severely limited. Each segment (full-service and limited-service) has historically represented about 50% of sales—a trend that has remained consistent over the past 25 years; however, in 2020 this trend was broken, with full-service restaurants representing only 27-43% of sales since the pandemic began.

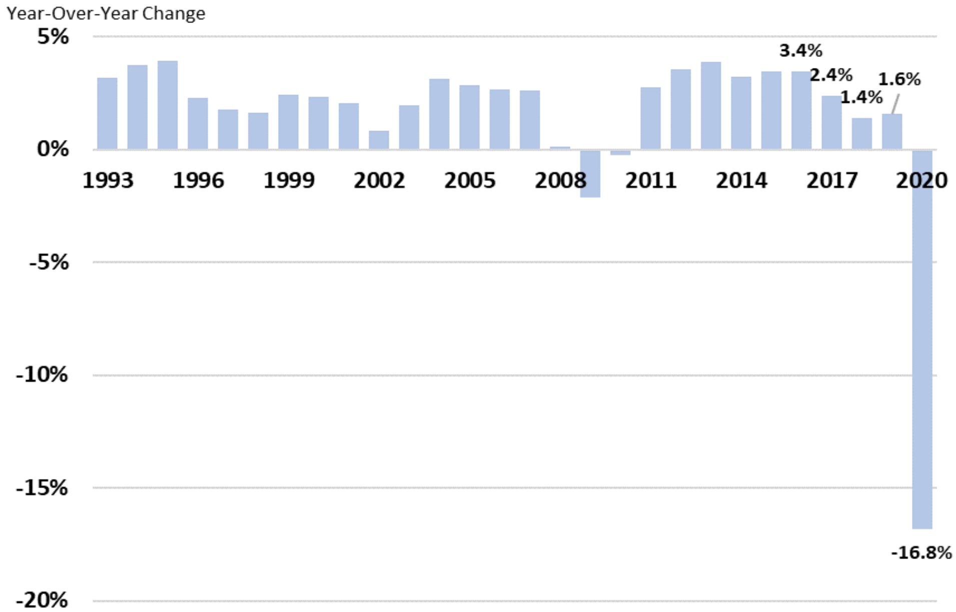
FIGURE 2: FULL- AND LIMITED-SERVICE RESTAURANT SALES, 1992–2021



Source: Census Bureau, Estimates of Monthly Retail and Food Service Sales by Kind of Business.

The food services sector represented just over 10 million workers nationally in 2020, after falling 16.8% year-over-year due to the pandemic-induced recession (Figure 3). This sector was one of the hardest hit in the economy, losing 5.3 million workers nationally in April 2020 alone. Since then, however, employment has rebounded strongly, with April 2021 levels 68% higher than April 2020; sector employment is still 13.5% below February 2020 levels.

FIGURE 3: YEAR-OVER-YEAR CHANGE IN FOOD SERVICES AND DRINKING PLACES EMPLOYMENT, 1993–2020



Source: Bureau of Labor Statistics, CES, Seasonally Adjusted.

ABOUT THE PARTICIPATING RESTAURANTS

The 124 responding restaurant brands represented every region of the United States. The Far West region garnered the most responses — 23.4% of the total (Table 1). Three regions represented over half (62.1%) of the responses—the Far West region (23.4%), the Mideast region (19.4%), and the Southeast region (19.4%). A plurality of responses came from restaurants in three states—California (15.3%), Colorado (12.9%), and New York (10.5%) (Table 2). The 124 respondents represented a total of 196 individual restaurant locations, with 23 (11.7%) in Colorado.

TABLE 1: REGIONAL LOCATIONS OF PARTICIPATING RESTAURANT BRANDS

Region	Responding Restaurants	Percent of Total
Far West	29	23.4%
Mideast	24	19.4%
Southeast	24	19.4%
Rocky Mountain	18	14.5%
Great Lakes	9	7.3%
Southwest	8	6.5%
Plains	7	5.6%
New England	5	4.0%
Total	**124**	**100.0%**

FIGURE 4: RESTAURANT BRAND PARTICIPATION BY REGION

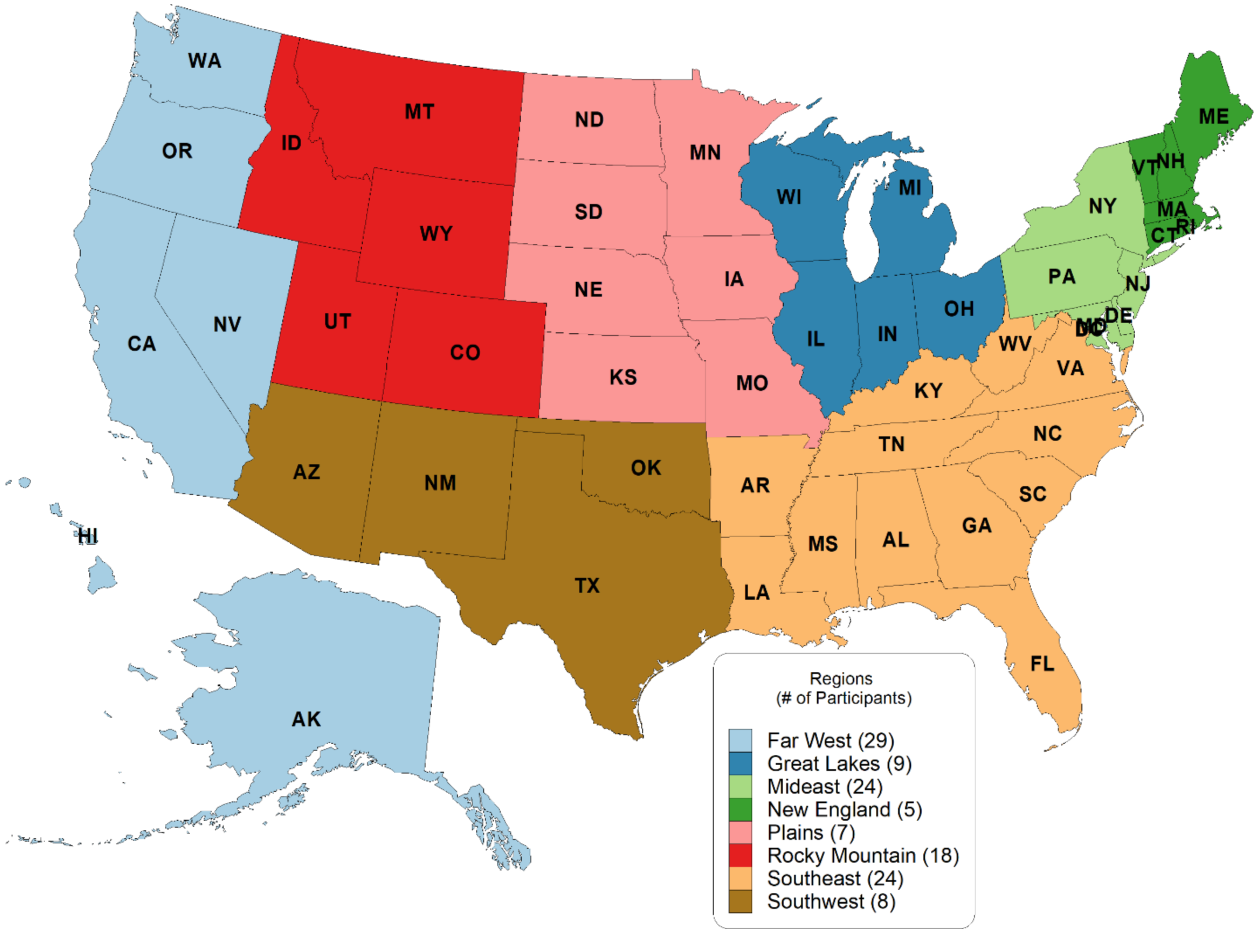
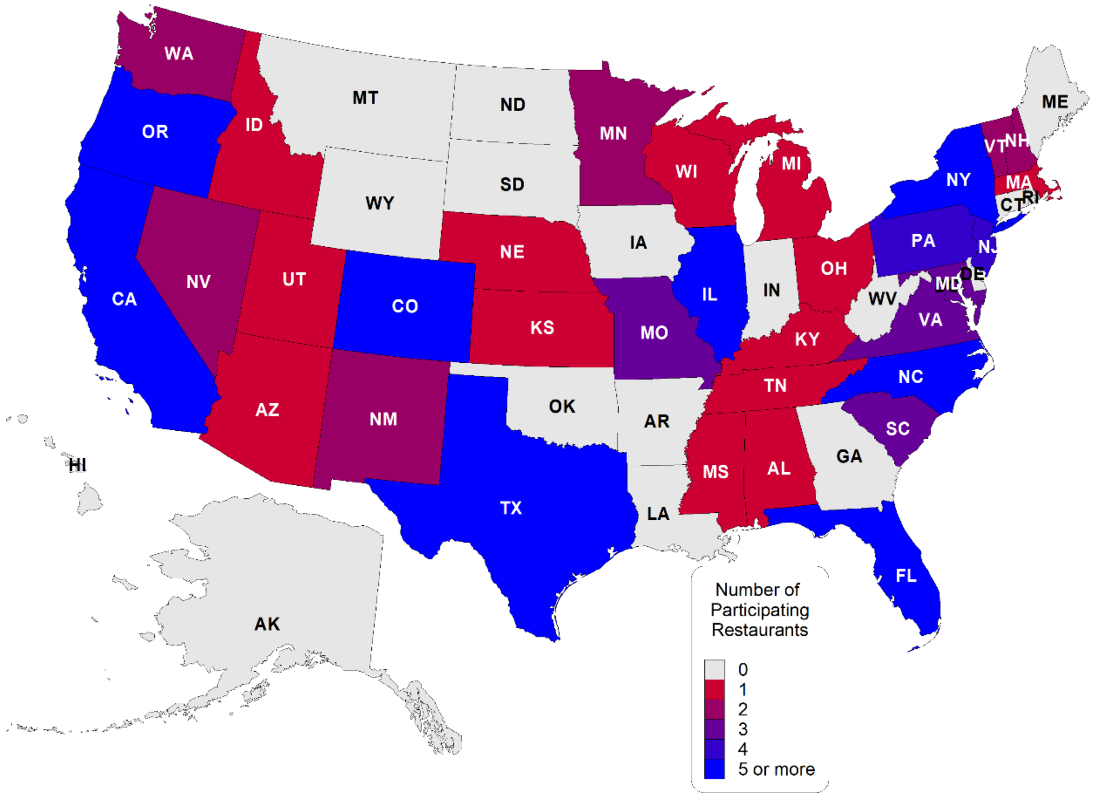


TABLE 2: STATE LOCATIONS OF PARTICIPATING RESTAURANT BRANDS

State	Responding Restaurants	Percent of Total
California	19	15.3%
Colorado	16	12.9%
New York	13	10.5%
Florida	9	7.3%
Illinois	6	4.8%
Oregon	6	4.8%
North Carolina	5	4.0%
Texas	5	4.0%
New Jersey	4	3.2%
Pennsylvania	4	3.2%
Maryland	3	2.4%
Missouri	3	2.4%
South Carolina	3	2.4%
Virginia	3	2.4%
New Hampshire	2	1.6%
Minnesota	2	1.6%
Nevada	2	1.6%
New Mexico	2	1.6%
Vermont	2	1.6%
Washington	2	1.6%
Alabama	1	0.8%
Arizona	1	0.8%
Idaho	1	0.8%
Kansas	1	0.8%
Kentucky	1	0.8%
Massachusetts	1	0.8%
Michigan	1	0.8%
Mississippi	1	0.8%
Nebraska	1	0.8%
Ohio	1	0.8%
Tennessee	1	0.8%
Utah	1	0.8%
Wisconsin	1	0.8%
Total	**124**	**100.0%**

FIGURE 5: RESTAURANT BRAND PARTICIPATION BY STATE



Almost half (48.4%) of responding restaurants identified as a Fine Dining restaurant, followed by Casual Dining (25.8%) and Catering/Off-Premise Events (16.6%) (Table 3). Participating restaurants could select more than one restaurant type, so total will not sum to 100%.

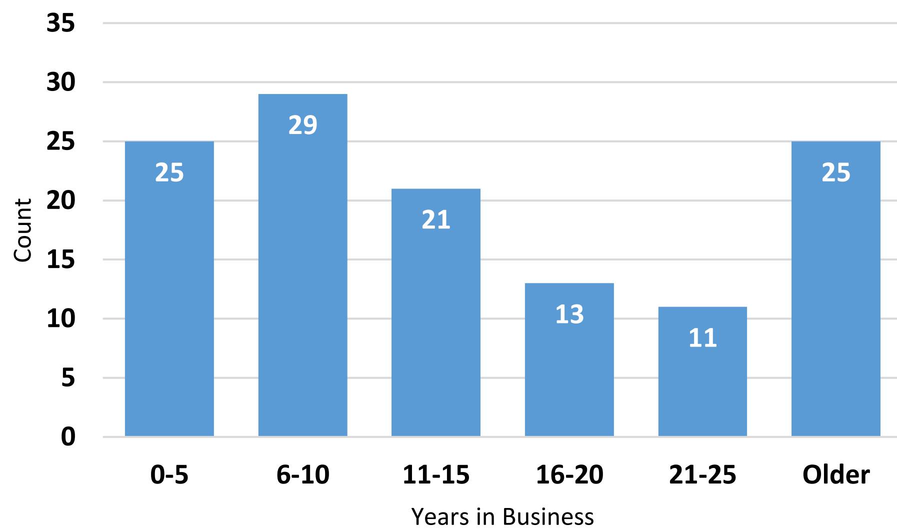
TABLE 3: TYPES OF PARTICIPATING RESTAURANTS

Restaurant Type	Responding Restaurants	Percent of Total
Fine Dining	60	48.4%
Casual Dining	32	25.8%
Catering / Off-Premise Events	21	16.9%
Bar	15	12.1%
Fast Casual	11	8.9%
Quick Service	8	6.5%
Coffee Shop/Cafe	7	5.6%
Food Service	6	4.8%
Food Truck	6	4.8%
Bakery	5	4.0%
Food Market/Specialty Shop	4	3.2%
Ultra-Fine Dining	2	1.6%
Juice Shop	1	0.8%

Note: Multiple responses could be chosen.

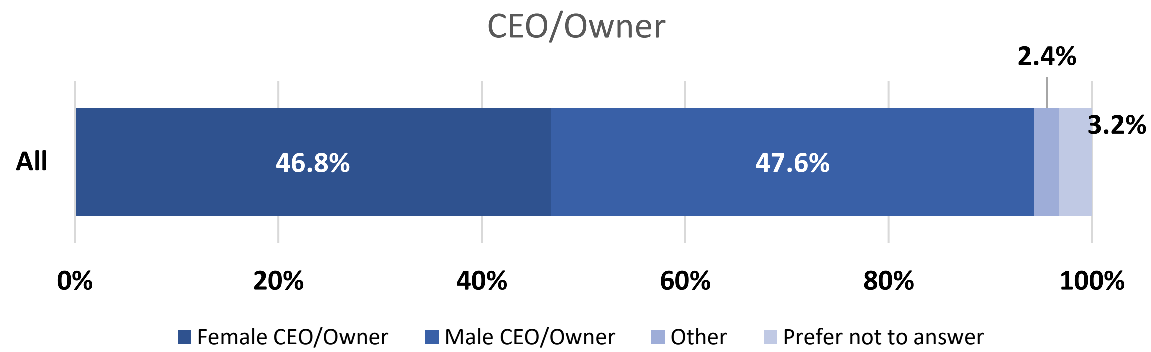
This cohort of 124 restaurant brands has been in business an average of 16.6 years, with a median age of 12 years. Slightly over one-fifth (20.2%) have been in business for 5 years or less and 43.5% have been in business for 10 years or less (Figure 6). There were five that started in 2020. By restaurant type, Food Service restaurants had the highest average age (29 years) and Bars had the lowest average age (14 years). Participating restaurant brands from the Far West region have been in business the longest, with an average age of 22 years, while brands in the Rocky Mountain region are the youngest, with an average age of 12 years.

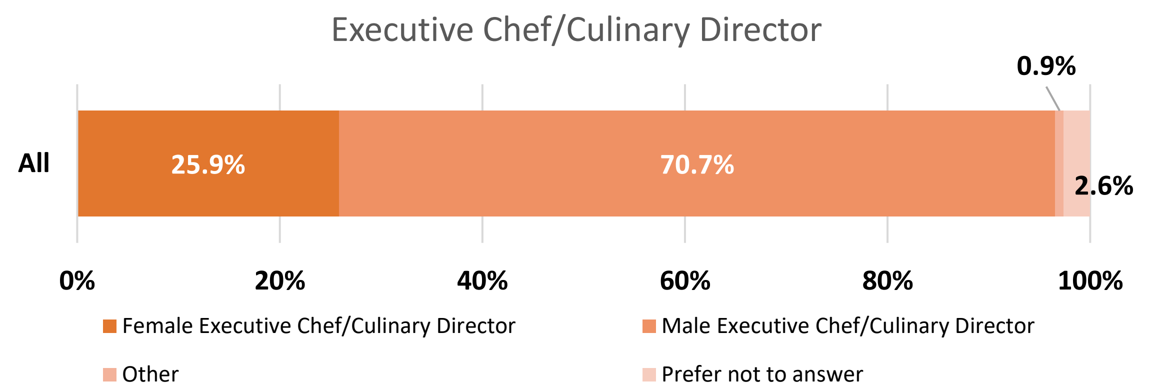
FIGURE 6: YEARS IN BUSINESS



Nearly half (46.8%) of the 124 participating restaurant brands reported having a female CEO or owner, while 25.9% reported (n=116) having a female Executive Chef or Culinary Director (Figure 7). By restaurant type, 4 out of 5 Bakeries and 3 out of 4 Food Market/Specialty Shops had a female CEO or owner and a female Executive Chef/Culinary Director.

FIGURE 7: GENDER OF CEO/OWNER AND EXECUTIVE CHEF/CULINARY DIRECTOR





Almost one-fifth (17.4%) of the 121 respondents reported having a non-white CEO or Owner, while over one-fourth (25.8%) reported (n=120) having a non-white Executive Chef or Culinary Director (Table 4). The Far West region reported the highest percentage (32.1%) of non-white CEOs or Owners, while the Southeast region reported the highest percentage (31.8%) of non-white Executive Chefs or Culinary Directors. Bakeries and Coffee Shops reported the highest percentage of non-white CEO or Owners with 73.3% and Foodservice (100%), Food Truck (83.3%), and Coffee Shops (80%) reported the highest percentage of non-white Executive Chef or Culinary Directors.

TABLE 4: RACE/ETHNICITY OF EXECUTIVE CHEF/CULINARY DIRECTOR/CEO/OWNER

Race/Ethnicity	CEO/Owner	Executive Chef/Culinary Director
American Indian/Alaska Native	1.7%	0.8%
Asian	9.1%	4.2%
Black/African American	1.7%	5.0%
Hispanic/Latino	4.1%	15.8%
Native Hawaiian or Other Pacific Islander	0.8%	0.0%
Other - Write In	2.5%	3.3%
Prefer not to answer	7.4%	6.7%
White	72.7%	64.2%

In 2019, an average 42.3% of hourly employees identify as BIPOC (Black, Indigenous, People of Color) across 71 responding restaurant brands, compared to 37.6% of salaried employees (n=57). In 2020, the average was 43.4% for hourly employees (n=62) and 37% for salaried employees (n=48). Differences between years cannot necessarily be compared directly since the same restaurants didn't respond for each year. Alternatively, the data suggests that the number of staff that identify as BIPOC declined from 2019 to 2020 when looking at the composition of BIPOC across the same companies. Among the 57 restaurants that provided data on the percentage of hourly staff that identify as BIPOC for both 2019 and 2020, 45.2% of identify as BIPOC in 2019 compared to 43.6% in 2020; among the 43 restaurants that provided data on the percentage of salaried staff that identify as BIPOC for both 2019 and 2020, 42.3% identify as BIPOC in 2019 compared to 38.3% in 2020.

Participating restaurant brands were asked about their awards and membership in various organizations (Table 5). Approximately 57.3% of participating restaurants reported being part of an Independent Restaurant Coalition (IRC) / #SAVERESTAURANTS and 40.3% are members of a national or state restaurant association. Additionally, 23.4% are Slow Food USA members, 16.1% are alums of the James Beard Foundation Chefs Boot Camp for Policy and Change, 14.5% are members of Chefs Collaborative. Almost one-fifth of the respondents reported involvement elsewhere, ranging from local associations (e.g., Slow Foods Utah, FARE Idaho) to national organizations (e.g., JBF WEL Program, Seafood Watch Blue Ribbon Task Force).

TABLE 5: AWARDS AND MEMBERSHIP

Award or Membership	Percentage
Independent Restaurant Coalition (IRC) / #SAVERESTAURANTS	57.3%
National or State Restaurant Association	40.3%
Slow Food USA	23.4%
JBF Bootcamp for Policy & Change Alum	16.1%
Chefs Collaborative	14.5%
JBF SmartCatch Program	11.3%
Les Dames d'Escoffier	8.9%
WCR - Women Chefs and Restaurateurs	8.1%
EatDenver (Colorado Only)	7.3%
James Beard Award Semifinalist	6.5%
James Beard Award Finalist/Nominee	5.6%
James Beard Award Winner	4.0%
Chefs Manifesto / United Nations SDG Goals	4.0%
World's 50 Best Restaurants	1.6%
Michelin Star	0.8%

Restaurant brands were also asked about their business practices. In 2020, 58.2% of the 79 respondents had a management/staff sexual harassment training and/or policy, 49.4% had anti-bias training and/or policy, and 46.8% had tip pooling (Table 6).

TABLE 6: BUSINESS PRACTICES

	2019	%	2020	%
Management/staff sexual harassment training and/or policy	57	67.9%	46	58.2%
Management/staff anti-bias training and/or policy	44	52.4%	39	49.4%
Tip pooling	43	51.2%	37	46.8%
Health insurance	40	47.6%	35	44.3%
Other - Please describe	12	14.3%	12	15.2%
No tipping or service included policy	9	10.7%	10	12.7%
None of the above	8	9.5%	9	11.4%

Note: Multiple responses could be selected. The total number of responding restaurants was 84 for 2019 and 79 for 2020.

PURCHASES AND SALES

Food purchases in 2019 for the 62 responding restaurant groups (113 individual restaurants represented) totaled $52.1 million. Total reported revenue in 2019 across 65 responding restaurant groups (115 individual restaurants represented) was $170.6 million. Total food purchases in 2020 across 65 responding restaurant groups (112 individual restaurants represented) was $26.7 million and total reported revenue was $82.4 million. Total food purchases per individual restaurant were $461,228 in 2019 and $238,459 in 2020. Total revenue per individual restaurant was $1.48 million in 2019 and $735,853 in 2020, a decline of 50.4%.

Average food costs in 2020 were 32.4% (simple average) of revenue (excluding beverage purchases); weighted average food costs were 44.6% of total food sales. This was an increase from average food costs of 30.5% (simple average) in 2019 and weighted average food costs of 33.3%. Food costs as a percent of revenue ranged from 13% to a high of 127%. Total spending on Personal Protective Equipment (PPE) and other health and safety precautions totaled $2.5 million in 2020 across 71 reporting restaurants.

The Great Lakes region observed the largest decline in sales per individual restaurant with a decline of 85.2%, followed by the Mideast region (-57.4%), and the Southeast region (53.2%) (Table 7). The Plains region only observed a 15.9% decline in revenue per restaurant. Results for the New England region cannot be disclosed due to too few of responses. It is important to note that each region consists of a different composition of restaurant types so comparing across regions could be misleading.

TABLE 7: YEAR-OVER-YEAR PERCENT CHANGE IN SALES PER INDIVIDUAL RESTAURANT BY REGION, 2020

Region	Percent Change
Plains	-15.9%
Far West	-39.9%
Southwest	-46.5%
Rocky Mountain	-47.3%
Southeast	-53.2%
Mideast	-57.4%
Great Lakes	-85.2%
All	**-50.4%**

By restaurant type, Bakeries had the lowest percent change in sales per individual restaurant, falling 23.3% from 2019 to 2020 (Table 8). Bars observed the steepest year-over-year drop in revenue per restaurant in 2020, with an 87.8% drop, followed by Food Trucks (-70.7%), and Food Market/Specialty Shops (-64%).

TABLE 8: YEAR-OVER-YEAR PERCENT CHANGE IN SALES PER INDIVIDUAL RESTAURANT BY RESTAURANT TYPE, 2020

Restaurant Type	Percent Change
Bakery	-23.3%
Other - Write In	-25.6%
Quick Service	-32.5%
Fast Casual	-36.6%
Casual Dining	-47.6%
Coffee Shop/Cafe	-52.5%
Foodservice	-57.0%
Fine Dining	-59.7%
Catering / Off-Premise Events	-62.9%
Food Market/Specialty Shop	-64.0%
Food Truck	-70.7%
Bar	-87.8%
All	**-50.4%**

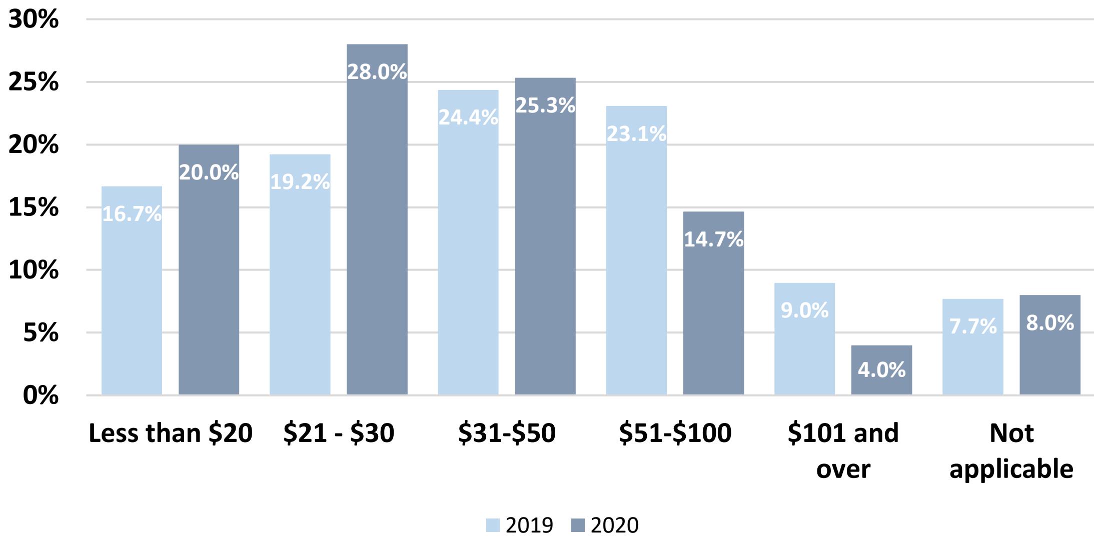
Note: Restaurants could identify as multiple restaurant types.

When looking at the same group of restaurant brands that reported both 2019 and 2020 purchase and sales numbers, total food purchases from 61 brands declined 41.2% from $45.1 million in 2019 to $26.2 million in 2020. Total reported revenue from this group declined 43.4% from $145.1 million in 2019 to

$81.4 million in 2020. This compares to a 28% drop in full-service restaurant retail sales and a 3.8% drop in limited service eating places retail sales in the U.S., as reported by the U.S. Census Bureau. Total purchases per individual restaurant among these 61 restaurant brands (representing 113 individual restaurants) declined from $398,874 in 2019 to $231,821 in 2020 and total revenue per restaurant declined from $1.28 million in 2019 to $720,571 in 2020.

The average check size was slightly different in 2020 compared to 2019. An average check size of $31-$50 was the most common in 2019, while an average check size of $21-$30 was the most common in 2020 (Figure 8).

FIGURE 8: AVERAGE CHECK



ECONOMIC CONTRIBUTION

The 68 participating restaurant brands in the Good Food 100 reported spending $52.1 million on bread and grains, dairy and eggs, fish and seafood, meat and poultry, fruits and vegetables, and other miscellaneous food items in 2019 and $26.7 million 2020. This group of businesses reported total 2019 revenue of $170.6 million and 2020 revenue of $82.4 million. Restaurants reported food costs of 44.6% of total food sales (excluding beverage purchases) in 2020.[1]

[1]The 44.6% represents a weighted average based on total food purchases. The simple average of food costs totaled 32.4% of total food sales.

The $26.7 million in total food purchases had a $75.7 million economic impact on the nation, including the direct, indirect, and induced impact of the purchases (Table 9). This excludes the impact of overall business operations, ranging from the purchase of alcohol to labor and rent.

TABLE 9: ECONOMIC CONTRIBUTION OF FOOD PURCHASES, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	107	$4.8	$7.9	$26.7
Indirect Effect	156	$8.7	$14.4	$34.3
Induced Effect	84	$4.7	$8.6	$14.7
Total Effect	**347**	**$18.3**	**$30.9**	**$75.7**

Note: Components may not sum exactly to the total due to rounding.

The Far West region had the greatest amount of total food purchases ($13.6 million), and hence, had the greatest economic impact ($30.7 million) (Table 10). The Southeast region had the second largest economic impact ($12.3 million), followed by the Rocky Mountain region ($11.9 million). The total economic contribution for each region, including employment, labor income, and value added, can be found in Appendix 2.

TABLE 10: TOTAL ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY REGION, 2020

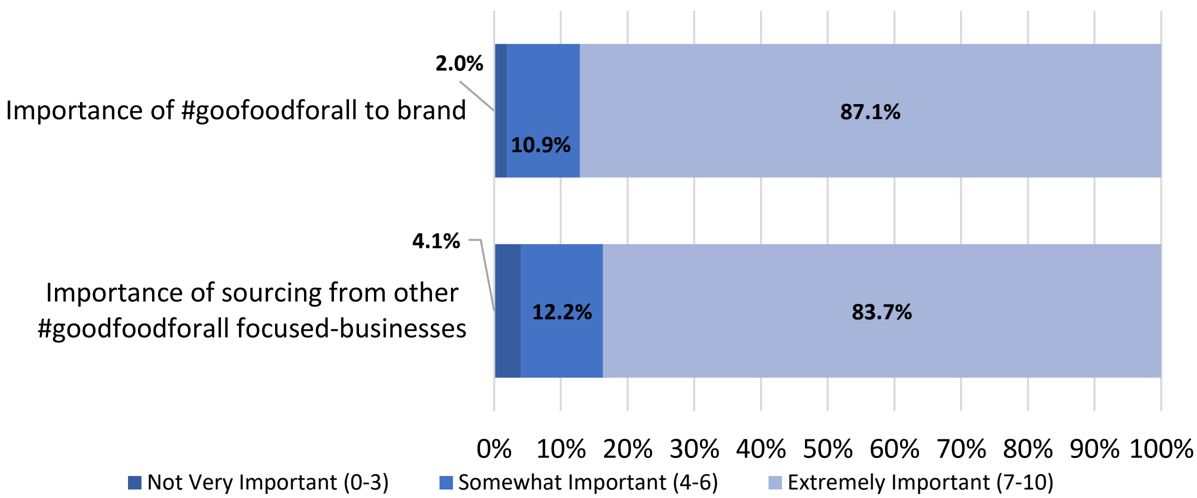
Region	Direct Output ($ Millions)	Total Output ($ Millions)
Far West	$13.6	$30.7
Southeast	$4.1	$12.3
Rocky Mountain	$5.4	$11.9
Plains	$0.6	$6.6
Southwest	$1.1	$4.9
Great Lakes	$0.8	$4.8
Mideast	$0.8	$3.3
New England	$0.4	$1.0
Total	**$26.7**	**$75.7**

QUALITATIVE RESPONSES

This report quantifies the economic contribution of the food supply chain of restaurants participating in the Good Food 100. In addition to food purchases, restaurants also shared employment numbers, commented on the definition of #goodfoodforall, and challenges for their employees. Another focus of the survey this year was the impact of the COVID-19 pandemic on restaurants, with questions around business model changes and financial aid and relief, as well as the outlook for the future.

In a subjective question, participants were asked how important #goodfoodforall is to their brand on a scale from 0 (not very important) to 10 (extremely important). The definition of #goodfoodforall is good (less bad) for every link in the food chain: the environment; plants and animals; farmers, ranchers, and fishermen; purveyors; restaurants (including workers), and eaters. Individual restaurants (regardless of type) rated #goodfoodforall brand importance between 2 and 10, with an overall average of 8.7. The majority (98%) of the restaurants that responded to the question (n=101) feel that it is either somewhat important or extremely important, while 56.4% gave a rating of 10 (Figure 9). Participants similarly ranked the brand importance of sourcing from other #goodfoodforall like-minded business.

FIGURE 9: IMPORTANCE OF #GOODFOODFORALL TO BRAND



Restaurants were also asked what #goodfoodforall means to them. The most common words used in the responses were local, community, people, sustainable, quality, and supporting, as can be seen in the word cloud in Figure 10 which shows the top 20 most used words across 77 responses.

FIGURE 10: WHAT #GOODFOODFORALL MEANS TO RESTAURANTS

Restaurants were asked about the greatest challenges facing their employees. The most common challenges for employees, each cited by 67% of the 88 respondents, were underemployment or unemployment and personal health, including mental health (Table 11). Healthcare costs were the third most cited challenge (52.3%), followed by affordable housing (50%), fear/prospect/risk of unemployment (45.5%), and childcare costs (29.5%).

TABLE 11: BIGGEST CHALLENGES FOR EMPLOYEES

Challenge	Restaurants	Percent
Underemployment or Unemployment	59	67.0%
Personal health, including mental health	59	67.0%
Healthcare costs	46	52.3%
Affordable housing, including the prospect of eviction	44	50.0%
Fear/prospect/risk of unemployment	40	45.5%
Childcare costs	26	29.5%
Transportation costs	16	18.2%
Food insecurity	11	12.5%
Commuting time	9	10.2%
Other	5	5.7%

Note: Number of responding restaurants to this question was 89.

Restaurants were asked to rank current priorities for their restaurant (Table 12). Overall, among the 106 respondents, employee health and welfare was the highest priority, coinciding with what restaurants believe to be their employee's biggest challenges currently in the midst of the pandemic and recession. This was followed by food quality and taste and supporting the local and regional economy.

TABLE 12: PRIORITIES

Priority	Rank
Employee health and welfare, including mental health	1
Food quality/taste	2
Supporting local/regional producers & purveyors	3
Food cost	4
Environmental sustainability	5
Animal welfare	6

COVID-19 Impact

Restaurant brands were asked multiple questions related to the impacts of COVID-19, including if they were currently open for business, if they pivoted their business model and how, and if they received financial relief.

Most of the restaurants were still open for businesses at the time of the survey, with only 10 out of the 108 responding restaurant brands reporting they have closed temporarily (7) or permanently (3). Six of the temporarily closed restaurants are Fine Dining, while one is a Bar; the three permanently closed restaurants are a Bar, Casual Dining, and Catering. While 91% of the restaurants were still open, 71.6% were open for delivery/take-out/curbside pickup, 64.2% were open for indoor service, and 56.9% were open for outdoor service. Only 15 (13.8%) were only open for delivery/take-out/curbside pickup, and 4 were only open for outdoor service.

Restaurants were asked if they have pivoted their business model and how they changed. The majority of the 108 responding restaurant brands have adapted, with 62% reporting they temporarily pivoted their business model and 35.2% reporting they have permanently pivoted. Approximately 10% reported they have not changed business operations. The number one reported change was a shift to take-out, reported by 75.6% of the 90 respondents, followed by at-home meal kits (42.2%), and chef prepared foods (40%) (Table 13).

TABLE 13: CHANGES TO BUSINESS MODEL

	Restaurants	Percent of Total
Take-out	68	75.6%
At-home meal kits	38	42.2%
Chef prepared foods	36	40.0%
Grocery/pantry items (e.g. olive oil)	33	36.7%
Other (please specify)	26	28.9%

Note: Restaurants could select multiple responses. The number of restaurants that responded to this question was 90.

Out of the 79 responding restaurant brands, 72 (91.1%) applied for financial aid/relief and every entity that applied for relief received it. Six brands didn't apply for relief: three in the Southeast region, two in the Far West, and one in the Plains; by restaurant type, three are Fine Dining, two are Casual Dining, and one is Food Service.

Of the 72 restaurant brands that applied for financial aid/relief, 69 (95.8%) applied for Federal relief, 41 (56.9%) applied for State relief, 36 (50%) applied for City/Community relief, and 7 (9.7%) applied for other sources of relief (Table 14). Other sources of aid/relief mentioned include grants, GoFundMe, High Roads Kitchen, JBF, NAACP, and private. Most reported applying to multiple relief sources, with 29 restaurants (40.2%) applying to Federal, State, and City/Community sources, 14 (19.4%) applying to both Federal and State sources, and 9 applying to both Federal and City/Community sources.

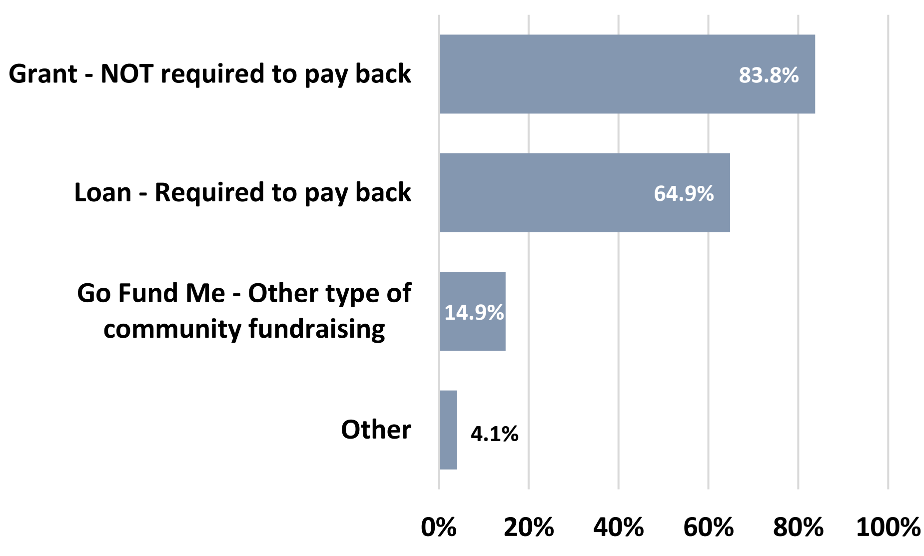
TABLE 14: SOURCES OF FINANCIAL AID/RELIEF

Type	Applied	Received
Federal	69	69
State	41	29
City/Community	36	30
Other - Write In	8	7

Note: Restaurants could select multiple responses. The number of restaurants that responded to this question was 72.

Grants, which are not required to be paid back, were the number one type of financial aid/relief received, received by 83.8% of the 74 responding restaurant brands (Figure 11). For analysis, included in Grants are the forgivable PPP loans. This was followed by loans, which are required to be paid back, received by 64.9% of the restaurants, GoFundMe, received by 14.9% or restaurants, and other, received by 4.1%.

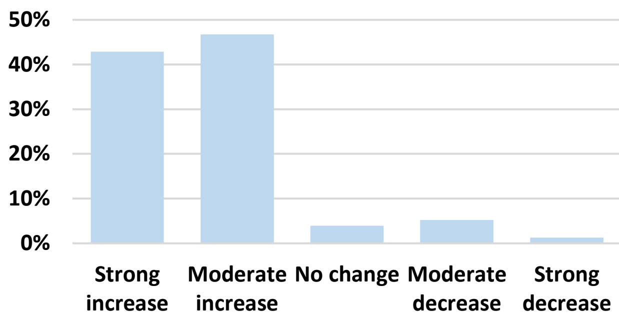
FIGURE 11: TYPE OF FINANCIAL AID/RELIEF RECEIVED



Looking Ahead

The responding restaurant brands provided input into their sales, hiring, and overall business expectations in the second half of 2021 (July – December). The majority of the 77 respondents expect a positive second half of the year, with 43% expecting a strong increase in revenue/sales and 47% expecting a moderate increase (Figure 12). Only one restaurant brand expects a strong decline in revenue/sales and three expect no change. By region, 92.3% of the 13 responding restaurant brands in the Rocky Mountain region, 87.5% of the 16 responding brands in the Southeast region, 81% of the 21 responding brands in the Far West region, and 80% of the 5 responding brands in the Plains region expect an increase in revenue/sales. All the responding brands in the Great Lakes (n=4), Mideast (n=9), New England (n=2), and Southwest (n=7) regions expect an increase in revenue/sales. By restaurant type, all the respondents in the Quick Service, Fast Casual, Foodservice, Bar, Bakery, and Food Truck categories expect an increase in sales in the latter half of the year.

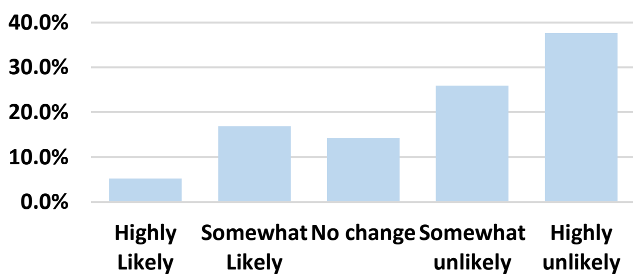
FIGURE 12: TOTAL RESTAURANT REVENUE/SALES EXPECTATIONS IN SECOND HALF OF 2021



	Total Restaurants	Percent of Total
Strong increase	33	43%
Moderate increase	36	47%
No change	3	4%
Moderate decrease	4	5%
Strong decrease	1	1%
Total Responses	**77**	**100%**

When asked about closing businesses or restaurant locations, 63.6% do not expect to have to close while 22.1% expect they might have to close in the second half of 2021 (Figure 13).

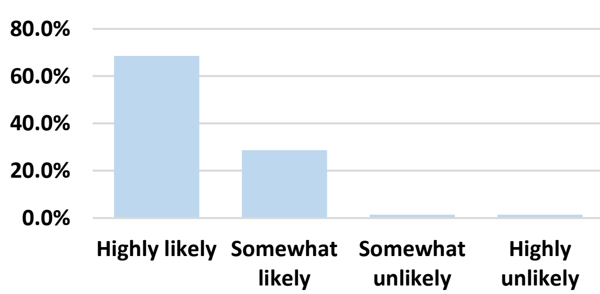
FIGURE 13: EXPECTATIONS OF HAVING TO CLOSE ONE (OR MORE) BUSINESSES/LOCATIONS IN SECOND HALF OF 2021



	Total Restaurants	Percent of Total
Highly Likely	4	5.2%
Somewhat Likely	13	16.9%
No change	11	14.3%
Somewhat unlikely	20	26.0%
Highly unlikely	29	37.7%
Total Responses	**77**	**100%**

Restaurant brands were very positive in their hiring expectations, with almost all (97.3%) expecting to hire employees in the second half of 2021 (Figure 14).

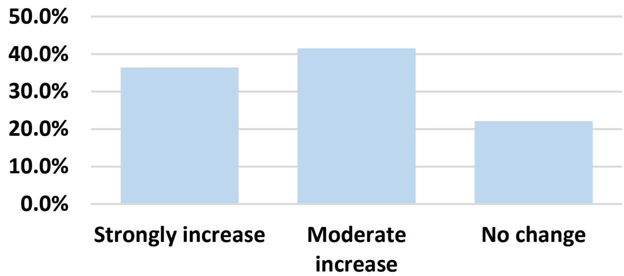
FIGURE 14: EXPECTATIONS FOR HIRING NEW EMPLOYEES IN SECOND HALF OF 2021



	Total Restaurants	Percent of Total
Highly likely	50	68.5%
Somewhat likely	21	28.8%
Somewhat unlikely	1	1.4%
Highly unlikely	1	1.4%
Total Responses	**73**	**100%**

Restaurant brands were also positive in their expectations for purchasing Good Food in the second half of 2021. Of the 77 respondents, 36.4% expect to strongly increase Good Food purchases, 41.6% expect to moderately increase purchases, and 22.1% expect no change in purchases (Figure 15). There were no restaurants that expect a decline in Good Food purchases.

FIGURE 15: EXPECTATIONS FOR PURCHASING GOOD FOOD IN SECOND HALF OF 2021



	Total Restaurants	Percent of Total
Strongly increase	28	36.4%
Moderate increase	32	41.6%
No change	17	22.1%
Total Responses	**77**	**100%**

An index was composed to reflect the four expectations about restaurant activity. An index value of 50 means the collective responses were neutral, while a value above 50 reflects overall optimism and below 50, pessimism. As summarized above, restaurant brands were generally positive looking ahead to the second half of 2021. The outlook index for hiring, sales and good food purchases were all above 60—well into positive territory, while their outlook on having to close restaurant locations was a little more tenuous.

TABLE 15: GOOD FOOD 100 EXPECTATIONS INDEX

Category	Index
Restaurant revenue/sales	61.8
Closing Locations	52.8
Hiring	66.0
Purchasing Good Food	60.5
Overall Index	**60.3**

In a qualitative question, restaurant brands were asked what the number one challenge in 2021 to implementing #goodfoodforall into their business was. Responses were pretty dispersed, covering a wide range of issues. Challenges that were mentioned include costs, dealing with large revenue losses from 2020, supporting staff in the midst of a the pandemic, difficulty in filling positions, adapting to the changing dynamics in the industry, and the ongoing concerns around COVID-19 and possible lockdowns/restrictions.

CONCLUSION

In the fifth annual rating of good food restaurants, GFMN promoted a national survey of restaurants that collected food supply chain data and looked at the impact that COVID-19 had on the industry. Data captured in the survey informed both the creation of the Good Food 100 rating and the estimation of the economic contribution from participating restaurants.

This study details the economic contribution of food purchases, including good food purchases. Overall, the economic contribution of food purchases by the 68 participating restaurant brands totaled $26.7 million in 2020, which had a $75.7 million economic impact on the nation.

BIBLIOGRAPHY

U.S. Bureau of Economic Analysis. BEA Regions, https://www.bea.gov/regional/docs/regions.cfm, accessed May 4, 2021.

U.S. Bureau of Economic Analysis. Industry Data, www.bea.gov, accessed May 4, 2021.

U.S. Bureau of Labor Statistics. Total Nonfarm Employment by Industry, www.bls.gov, accessed May 4, 2021.

U.S. Census Bureau, Monthly & Annual Retail Trade, https://www.census.gov/retail/index.html, accessed May 7, 2021.

APPENDIX 1: PARTICIPATING RESTAURANTS

The following 147 restaurants from 124 restaurant brands participated in the Good Food 100. Some restaurants have multiple locations.

TABLE 16: PARTICIPATING GOOD FOOD 100 RESTAURANTS™

Restaurant	Region	Type
Andy's Latin American Cuisine	Southeast	Quick Service, Food Truck
Anzie Blue	Southeast	Casual Dining
Aromas	Southeast	Fine Dining, Coffee Shop/Café
Aromas DG	Southeast	Fine Dining, Coffee Shop/Café
Aromas OP	Southeast	Fine Dining, Coffee Shop/Café
Aromas SWEM	Southeast	Fine Dining, Coffee Shop/Café
Atomic Ramen	Southeast	Foodservice
Bar Sotano	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
Bar West	Far West	Casual Dining
Barbosa's Barbeque	Rocky Mountain	Food Truck, Catering/Off-Premise Events, Other
Barcha	Far West	Fine Dining, Catering/Off-Premise Events
BBQ Mexicana	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
Bean Barley	Southeast	Fine Dining
beast + bottle	Rocky Mountain	Fine Dining
Beffa's Bar & Restaurant	Plains	Casual Dining, Bar
Benihana	Great Lakes	Fine Dining
Bittercreek Alehouse	Rocky Mountain	Fine Dining
Blackbelly	Rocky Mountain	Fine Dining, Catering/Off-Premise Events
BLD Diner	Southeast	Fine Dining
Border Grill	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
Buks Lincoln Street Diner	Mideast	Casual Dining, Other
Burger Bar Chicago - South Loop	Great Lakes	Casual Dining, Fine Dining
Cafe La Tazita	Far West	Coffee Shop/Café
Campo at Los Poblanos	Southwest	Fine Dining
Cape Hospitality Group	Mideast	Casual Dining
Charcoal Zyka Inc	Southeast	Casual Dining
Chatterbox Brews	Plains	Casual Dining
Chef Robért Catering Inc.	Far West	Catering/Off-Premise Events
Chook Charcoal Chicken	Rocky Mountain	Quick Service, Causal Dining
Chris Coleman Catering	Mideast	Catering / Off-Premise Events
Clock Tower Grill	Mideast	Fine Dining
Coast and Valley	Mideast	Casual Dining, Fine Dining, Bar
Coperta	Rocky Mountain	Fine Dining
cork&olive	Southeast	Fine Dining
Crested Butte's Personal Chefs	Rocky Mountain	Food Market/Specialty Shop, Catering / Off-Premise Events
Cured Restaurant	Southwest	Fine Dining

Custom Catering	Southeast	Catering / Off-Premise Events
Diablo & Sons Saloon	Rocky Mountain	Fine Dining
Diane's Market Kitchen	Far West	Other
Doug Boster Gourmet Catering	Southwest	Catering / Off-Premise Events
East End Food Institute	Mideast	Other
Eddie Papas American Hangout	Far West	Casual Dining
Eden West Food Truck	Southwest	Food Truck
Eighty Acres Kitchen &Bar	Mideast	Fine Dining
El Five	Rocky Mountain	Fine Dining
Elderslie Farm	Plains	Fine Dining, Ultra Fine Dining
End of Elm	Mideast	Casual Dining, Fine Dining, Catering / Off-Premise Events, Bar, Other
Farm Spirit	Far West	Fast Casual
Farmers Market Restaurant	Southeast	Casual Dining
Felina Restaurant	Mideast	Fine Dining, Catering / Off-Premise Events, Bar
Floriole Bakery	Great Lakes	Bakery, Coffee Shop/Café
Folk	Great Lakes	Quick Service, Casual Dining, Food Market/Specialty Shop, Catering / Off-Premise Events, Coffee Shop/Café
Forizon Cafes	Far West	Quick Service, Foodservice, Catering / Off-Premise Events
Frasca Food and Wine	Far West	Quick Service, Casual Dining, Fine Dining, Catering / Off-Premise Events
Fresh & Natural Cafe	Far West	Quick Service, Foodservice, Catering / Off-Premise Events
Frontera Cocina	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
Frontera Grill	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
Fruition Restaurant	Rocky Mountain	Fine Dining
Gardens of Salonica: New Greek Cafe & Deli	Plains	Casual Dining
Good Choice Kitchen	Mideast	Fast Casual,Casual Dining
Grana	Southeast	Fine Dining
Grand Central Bakery	Far West	Quick Service, Fast Casual, Bakery
Harbour Restaurant	New England	Casual Dining, Bar
Hillside Farmacy	Southwest	Casual Dining
Indigenous	Southeast	Fine Dining
Indigo Restaurant	Great Lakes	Fine Dining
Inky's	Southeast	Fast Casual
JN Restaurants	Rocky Mountain	Fine Dining
Larchmont Tavern	Mideast	Casual Dining
Liberty Tavern LTD	Mideast	Bar
Linger	Rocky Mountain	Fine Dining
L'Oca d'Oro	Southwest	Fine Dining
Lucca	Far West	Fine Dining
LuLou's Restaurant and Lounge	Far West	Fine Dining
Magpie Café	Far West	Casual Dining

Mattellies LLC	Mideast	Fine Dining, Catering / Off-Premise Events
Mattison's Catering Company	Southeast	Fine Dining
Mattison's City Grille	Southeast	Fine Dining
Mattison's Forty One	Southeast	Fine Dining
Mattison's Riverwalk Grille	Southeast	Fine Dining
Maximillian’s Grill and Wine Bar	Southeast	Fine Dining
Max's On Broadway	Mideast	Bar
Max's Taphouse	Mideast	Bar
Mercantile Dining & Provision	Rocky Mountain	Fine Dining
Mixtape	Mideast	Bar
MOR Bakery & Café	Great Lakes	Bakery
Mulvaney's B&L	Far West	Fine Dining
Nostrana	Far West	Fine Dining, Bar
Off Menu Hospitality	Far West	Other
Ophelia's Electric Soapbox	Rocky Mountain	Fine Dining
O'Rorkes	Mideast	Casual Dining, Bar
Park Heights Restaurant	Southeast	Fine Dining
Pepita Corp	Mideast	Fine Dining
158 Main	New England	Casual Dining
Picka Rico	Far West	Fast Casual
Plaza Deli	New England	Catering / Off-Premise Events, Coffee Shop/Café
Posana	Southeast	Fine Dining
Radcol, Inc	Mideast	Casual Dining
Red Feather Lounge	Rocky Mountain	Fine Dining
Residual Sugar Wine Bar	Far West	Fine Dining
Revival	Far West	Fine Dining
NOVEL KC	Plains	Fine Dining
Root & Stem	Southeast	Catering / Off-Premise Events
Root Down	Rocky Mountain	Fine Dining
Rooted Craft Kitchen	Rocky Mountain	Fast Casual
Saldivia's South American Grill	Southwest	Fine Dining
Sapphire Supper Club, Inc.	Far West	Fine Dining
Sens	Far West	Fine Dining, Catering/Off-Premise Events
Shelburne Farms	New England	Casual Dining, Fine Dining, Food Truck
Socalo	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
Sociale & Cafe Press Chicago	Great Lakes	Casual Dining, Fine Dining
Soda Jerks at Action Lube	Mideast	Fast Casual, Bakery
Spuntino	Rocky Mountain	Fine Dining
St. Kilian's Cheese Shop	Rocky Mountain	Food Market/Specialty Shop
Starry Band Inc.	Far West	Fine Dining, Catering / Off-Premise Events
State Theatre & Michigan Theater	Far West	Quick Service
Store House Market & Eatery	Southwest	Casual Dining
Stripchezze	Far West	Food Truck
Tables	Rocky Mountain	Fine Dining

Ted's Restaurant	Southeast	Fast Casual, Other
The Beach Club	Mideast	Casual Dining, Foodservice, Bar
The Blended Table	Rocky Mountain	Catering / Off-Premise Events, Other
The Breadfruit & Rum Bar	Southwest	Fine Dining, Bar
The Brunch	Southeast	Casual Dining
The Grove Cafe & Market	Southwest	Quick Service, Fast Casual, Casual Dining, Coffee Shop/Café
The Herbfarm Restaurant	Far West	Fine Dining
The Heron Restaurant	Mideast	Fine Dining
The Hound's Tale	Southeast	Fine Dining, Coffee Shop/Café
The Hound's Tale Corner BARkery	Southeast	Fine Dining, Coffee Shop/Café
The Market Place Restaurant	Southeast	Fine Dining
The Orchard Restaurant & Events Barn	Southeast	Fine Dining, Catering / Off-Premise Events
The Pompadour	Great Lakes	Fine Dining
The Silverspoon	Mideast	Fine Dining
Theresa & Johnny's	Far West	Casual Dining
Thirdwave Cafe & Wine Bar	Southeast	Fine Dining
Thompson House Eatery	New England	Fine Dining
Topolobampo	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
Trailer Park Lounge	Mideast	Casual Dining
Tutti Frutti Coffee Shop	Great Lakes	Fast Casual, Casual Dining, Coffee Shop/Cafe, Juice Shop
UC Davis Health	Far West	Foodservice
UCSF Health	Far West	Foodservice
Vital Root	Rocky Mountain	Fine Dining
Warren Tech Central / WT Culinary	Rocky Mountain	Other
Whitebread LLC	Plains	Fine Dining
Wilf’s Restaurant & Jazz Bar	Far West	Fine Dining
Wine Merchants Warehouse	Southeast	Fine Dining, Food Market/Specialty Shop, Catering / Off-Premise Events, Other
Xoco	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar

APPENDIX 2: FOOD ECONOMIC IMPACTS BY REGION

The region-level economic impacts are based on resident restaurants' total food purchases. The tables below only present the economic impact of food purchases, and do not include the impact of restaurant operations.

TABLE 17: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE FAR WEST REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	58	$3.1	$4.8	$13.6
Indirect Effect	55	$3.4	$5.3	$10.8
Induced Effect	35	$2.1	$3.9	$6.4
Total Effect	147	**$8.6**	**$14.0**	**$30.7**

Note: Sum may differ from total due to rounding.

TABLE 18: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE SOUTHEAST REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	15	$0.6	$0.8	$4.1
Indirect Effect	27	$1.4	$2.3	$6.1
Induced Effect	14	$0.7	$1.2	$2.2
Total Effect	**56**	**$2.6**	**$4.3**	**$12.3**

Note: Sum may differ from total due to rounding.

TABLE 19: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE ROCKY MOUNTAIN REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	19	$0.7	$1.4	$5.4
Indirect Effect	25	$1.2	$2.0	$4.8
Induced Effect	11	$0.5	$1.0	$1.8
Total Effect	**55**	**$2.4**	**$4.5**	**$11.9**

Note: Sum may differ from total due to rounding.

TABLE 20: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE PLAINS REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	2	$0.1	$0.1	$0.6
Indirect Effect	17	$0.9	$1.7	$4.9
Induced Effect	7	$0.3	$0.6	$1.1
Total Effect	**25**	**$1.3**	**$2.4**	**$6.6**

Note: Sum may differ from total due to rounding.

TABLE 21: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE SOUTHWEST REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	6	$0.1	$0.2	$1.1
Indirect Effect	13	$0.6	$1.1	$2.8
Induced Effect	6	$0.3	$0.5	$1.0
Total Effect	**24**	**$1.0**	**$1.8**	**$4.9**

Note: Sum may differ from total due to rounding.

TABLE 22: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE GREAT LAKES REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	3	$0.1	$0.2	$0.8
Indirect Effect	11	$0.6	$1.1	$3.0
Induced Effect	6	$0.3	$0.6	$1.0
Total Effect	**20**	**$1.1**	**$1.8**	**$4.8**

Note: Sum may differ from total due to rounding.

TABLE 23: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE MIDEAST REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	3	$0.1	$0.2	$0.8
Indirect Effect	6	$0.5	$0.8	$1.6
Induced Effect	5	$0.3	$0.6	$0.9
Total Effect	**14**	**$0.9**	**$1.5**	**$3.3**

Note: Sum may differ from total due to rounding.

TABLE 24: ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANTS IN THE NEW ENGLAND REGION, 2020

Impact Type	Employment	Labor Income ($ Millions)	Value Added ($ Millions)	Output ($ Millions)
Direct Effect	2	$0.1	$0.1	$0.4
Indirect Effect	2	$0.1	$0.2	$0.4
Induced Effect	2	$0.1	$0.2	$0.3
Total Effect	**5**	**$0.3**	**$0.5**	**$1.0**

Note: Sum may differ from total due to rounding.